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**REPORT OF PRELIMINARY PLANNING PROJECT
FOR
AN ANALYTICAL CASE STUDY
OF
THE KOREAN EDUCATIONAL DEVELOPMENT INSTITUTE**

Contract AID/ea-C-1082 (Korea)

Prepared by:

Paul H. Masoner

April, 1975

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TABLE OF CONTENTS

	Page
I. Introduction	1
II. Initial Developments in the Analytical Case Study . . .	3
III. The Purposes of the Analytical Case Study	6
IV. Background for Design Development	8
V. The Analytical Case Study Design	11
VI. The Project Time Schedule	15
VII. Team and Consultant Reports	17
VIII. The Study Team and the Consultants	18
IX. Team and Consultant Schedule in Korea	21
X. Proposed Budget	23
XI. The Contract	27
Appendices	
A. An Outline of the Analytical Case Study of KEDI	30
B. Tryout and Demonstration of New Instructional System . .	35
C. Background Information for Team and Consultants	38
D. Team/Consultant Recommendations	40

1. INTRODUCTION

The Korean Educational Development Institute (KEDI), founded in 1972 by the Ministry of Education as its external research component, is an independent, autonomous, and government-funded educational research and development center. Early in 1973 the Institute was authorized by law (the Korean Educational Development Institute Act) as a special juridical foundation. The primary mission of KEDI is "to undertake comprehensive and systematic reform programs for the schools in Korea."

A major responsibility undertaken by KEDI is the Elementary-Middle School Development Project, designed to introduce into the elementary and middle schools of the nation more efficient, more effective, and higher quality educational programs. Other responsibilities of KEDI include formal and non-formal educational programs that will utilize broadcasting and correspondence study, a five-year educational development plan for the nation, teacher education, industrial arts - vocational education, population education, and national assessment of student achievement.

Initial efforts in this entire array of significant undertakings as well as in other research and development tasks have involved KEDI in a number of critical areas of concern. Among them are:

1. Educational goals
2. Educational policy
3. Curriculum development
4. New instructional systems
5. Learning and instructional materials
6. Instructional television and radio

7. Teacher education (pre-service and in-service)
8. Innovation diffusion
9. Non-formal education

It is clear from these developments that Korea has not only made a significant commitment to education but has been simultaneously involved in the development of major goals for educational improvement and the creation of a means for the achievement of these goals.

Of considerable significance is the fact that in a period of approximately two years KEDI has become a major force for educational change and has developed a mechanism and a thrust that has high potential for a comprehensive reform of education and for a continuing process of development and improvement. It is not surprising, in the face of the tasks to be undertaken and the remarkable accomplishments already attained, that KEDI has expressed an interest in an analytical case study to be made by an external professional group that will serve to document the origins and early development of KEDI, that will carefully review and analyze the planning and operations of the first two years, and that will over the next several years continue such study and analysis as well as an assessment of progress, working closely with KEDI administration and staff, providing continuous feedback, and becoming a partner in the comprehensive effort to improve education in Korea. There is a firm belief that the ultimate report from the study will be useful to KEDI in its continuing efforts to improve education in Korea and at the same time will be an important means of disseminating information concerning KEDI and its work that will be helpful to other nations concerned with educational reform programs.

II. INITIAL DEVELOPMENTS IN THE ANALYTICAL CASE STUDY

At the request of USAID/KOREA the writer engaged in preliminary discussions concerning this undertaking with KEDI administration and USAID staff in Korea in August of 1974. In November of the same year the writer participated in the International Conference on Korean Educational Development Project and gained much additional insight into the nature of KEDI and the comprehensive educational reform programs in which it is involved. At that time an invitation was extended to the writer jointly by KEDI and USAID/KOREA to become involved in the proposed analytical case study and to serve as team leader. The invitation to participate in this most important and challenging project was accepted.

In December and January discussions and negotiations were held with AID/Washington concerning the development of a contract to carry out the analytical case study. Because of certain funding limitations it was agreed that two separate contracts would be negotiated, the first for a Preliminary Planning Phase and the second for an Operational Phase.

A contract for the Development of Study Team (Preliminary Planning Phase) was executed. The contract listed the following objective:

The Contractor will assist in developing the scope of work for the Study Team, including the selection of team members, who will undertake the Korean Educational Development Institute (KEDI) Analytical Case History.

In addition, the contract defined the scope of work as follows:

The Contractor will perform the following:

1. Review the qualifications and evaluate potential candidates for team membership, to include the preparation of CVs for KEDI and USAID consideration.
2. Develop the scope of work for the study as outlined in TOAID A-036 dated 4/4/74. This shall be accomplished in Korea in March 1975 and it is anticipated to require three weeks in Korea.
3. Secure KEDI and USAID concurrence on nominees.
4. Upon return to AID/W confer with EA/TECH on specific items concerning the actual formation of the team and the timing of the study.

Following the execution of the contract the writer, prior to leaving the United States, undertook two tasks. One involved the preparation of a statement dealing with a possible design for the analytical case study. Entitled A Proposed Design for an Analytical Case Study of KEDI, the statement was intended to serve as the basis for discussions and further planning with both USAID/KOREA and KEDI. The second task involved discussions with a large number of competent professionals concerning their possible involvement in the study as either team members or consultants. Conversations with many of these individuals were arranged to occur during the Annual Meeting of the American Association of Colleges for Teacher Education in Chicago and on the campus of the University of Pittsburgh. In addition several were reached via the long distance telephone. Biographical statements for more than 25 interested persons were brought to Korea. Information on others for whom biographical statements were not immediately

received was available in such publications as Who's Who in America and Leaders in Education.

Once in Korea the writer worked closely with KEDI administration and staff in the development of a design for the analytical case study, in the determination of a possible time frame for the study, in the identification and selection of potential team members and consultants, and in the planning of a strategy for the accomplishment of the total task. At all times there was continued consultation in order to assure general consensus of KEDI, USAID/KOREA, and the contractor on the various aspects of the plan as it was developed.

Important to the writer in the accomplishment of the contract requirements and the development of the project design was the opportunity to meet and talk with key administrators and staff of KEDI, to participate in a number of planned visits to schools and other educational institutions, to meet and confer with a number of educational leaders.

The outcome of these cooperative activities in Korea is described in the remainder of this report. Included in the pages that follow are a statement of the purposes of the analytical case study of KEDI, the basic principles and assumptions underlying the development of the design, the design itself, the time frame for the study, the nature of the study team and consultants, certain operational procedures, an estimate of costs, and a panel of potential team members and consultants that has been reviewed by both KEDI and USAID/KOREA.

III. THE PURPOSES OF THE ANALYTICAL CASE STUDY

✓ The analytical case study of KEDI, because of the significant role of the Institute in the development and improvement of education in Korea, is obviously a matter of great interest to many individuals and groups within Korea -- the Ministry of Education; the universities and colleges, especially the schools, colleges, and departments of education; the administrators and teachers in the public and private schools throughout the country; the educational community generally; and, of course, the public. Further, AID, because of its close relationship with and deep involvement in KEDI, has a very special concern for this study which promises not only to document the development of KEDI and assess its progress but also to provide during the course of the study consultative resources for the continued development of KEDI and its operations. [Finally, the international community of educators in both developed and developing nations looks to a careful and detailed documentation of an extraordinary educational effort which may have important implications for all educational reform movements.]

The following statement of purposes which undergird the analytical case study is believed to represent the combined concerns of the groups and individuals just identified and at the same time presents a logical basis for the proposed undertaking.

1. To document and analyze systematically the origin, development, and program of KEDI as the major educational research and development operation of Korea.
2. To study the developmental history and effective-

ness of KEDI and the progress that it has achieved in relationship to its internal purposes and goals and the educational goals of the nation.

3. To provide, during the period of the study, . systematic and continuing reports to KEDI concerning activities, findings, and conclusions of the team and consultants.
4. To develop a model for continuous study and assessment of the continuing efforts for educational reform and improvement by KEDI alone or in cooperation with external groups.
5. To provide a document for developed and developing nations which will describe KEDI as a possible model for those concerned with educational reform and improvement.

IV. BACKGROUND FOR DESIGN DEVELOPMENT

The design, as described later in this report, is the product of close working cooperation involving the writer and KEDI administration and staff. In addition, consultation prior to the visit to Korea was held by the writer with Dr. Robert Morgan of Florida State University because of his long and deep involvement in educational developments in Korea and in KEDI itself. Other sources of information useful in the development of the design came from the International Conference on Korean Educational Development Project held in November 1974 in which the writer participated. Still other assistance came from KEDI and AID publications. The initial preliminary statement prepared in the United States prior to the visit served as a useful and important point of reference.

There are certain basic requisites that would appear essential to the design of the analytical case study. They include:

1. The design must involve and be applicable to all programs and tasks of KEDI that are related to its mission, goals, and objectives.
2. The design, in order to be optimally effective, must involve the participation of both KEDI and AID in its development and must have their approval and endorsement.
3. The design must be subject to continuous review by the team and consultants, by KEDI, and by AID in terms of its efficiency and effectiveness and must be subject to appropriate modification aimed at its improvement.

A number of planning assumptions have been developed jointly by the writer and KEDI administration and staff. These assumptions which are listed below provide an important basis for the development of a design for the analytical case study.

1. The primary responsibility for the study will be that of an external professional group of team members and consultants.
2. KEDI administration and staff will have a close and continuous involvement in the study through a variety of cooperative arrangements.
3. KEDI, with its constant concern for measurement and appraisal of its efforts, has essential and basic information at hand that is important to assessment and study by an external agency.
4. KEDI shall be responsible to a considerable degree for providing a wide range of information and data required for team and consultant use, analysis, and interpretation.
5. Team members and consultants, in addition to the development of close working relationships with counterparts in KEDI, shall establish similar modes of cooperation with members of the educational community in Korea.
6. Both the team and consultants and KEDI administration and staff shall work cooperatively in an atmosphere conducive to continuous interchange and feedback.

7. The project shall be characterized by peer-type relationships in which colleagues are working co-operatively for common goals in an atmosphere sensitive to the Korean cultural setting.
8. Prior to completion, team reports, ad hoc, interim, and final, shall be reviewed jointly by the team and KEDI in the interests of accuracy, applicability, and potential usefulness.
9. The ultimate responsibility for all reports shall be that of the team, the consultants, and the team leader.
10. Reports, ad hoc, interim, and final, shall be made available to both KEDI and AID.

V. THE ANALYTICAL CASE STUDY DESIGN

On the basis of the planning assumptions stated earlier and through considerable discussions with KEDI administration and staff a proposed model has been developed for the analytical case study. The model represents certain modifications in the process used in the United States for the accreditation of higher education institutions. The process of accreditation, perhaps unique to the United States, has become well-established and has gained considerable acceptance as a systematic and valid strategy for evaluating the organization, programs, and outcomes of colleges and universities. Such a strategy, if applied to the analytical case study of KEDI, does require some modification to fit the purposes and circumstances of the project. However, with relatively few changes, none of serious or significant consequence, the model does meet the planning assumptions and at the same time has a high relevance to the task and the purpose to be served.

The study model which is proposed for the analytical case study of KEDI includes the following procedures:

1. The development of an outline for the study which will include all those elements which it is anticipated should appear in the final team report. A preliminary outline for the study, developed at this time by the writer in cooperation with KEDI, appears in the Appendix. This preliminary outline is, of course, subject to continuing revision as the study progresses.

2. The selection of an external team and consultants with the knowledge and skills appropriate and relevant to the individual tasks and the total task to be accomplished.
3. The development by the study team and consultants, in cooperation with KEDI, of a systematic study strategy which will include indicators which permit measurement and assessment of KEDI programs; standards or criteria to be utilized; nature and methods of data collection; establishment of counterpart relationships; nature and use of conferences with educators, parents, students, civic leaders, and others; observation of educational programs; analyses to be made and methods of analysis; data interpretation; other relevant tasks; and the development of findings, conclusions, and recommendations.
4. Completion by KEDI of a special report prior to the beginning of team and consultant efforts (KEDI Report) based on the outline of the study. This report, which need not be organized formally in accordance with the outline, may consist of a variety of KEDI documents and reports that are already available and that bear on the elements in the study outline. Included may be appropriate KEDI internal evaluative materials, copies of instructional materials, curricula, teaching-learning strategies, and other appropriate materials. This KEDI Report shall be updated from time to time during the period of the study as required.

5. Provision of other information by KEDI relating to the origin of KEDI, national education reform plans, historical information, baseline educational statistics, and other information viewed as relevant by the team or by KEDI.
6. Review, study, and analysis of all available and pertinent data from the KEDI Report, from other KEDI publications, and from other sources by team members and consultants prior to travel to Korea and on a continuing basis while in Korea.
7. Team and consultant visits to Korea in order to accomplish project tasks including the following:
 - a. Establishment of counterpart relationships with KEDI staff and others.
 - b. Continued study and review of all applicable data, instructional materials, instructional television and radio programs.
 - c. Study and review of management systems, evaluation procedures, innovation diffusion, long range educational planning, and other strategies.
 - d. Observation of educational systems and educational projects.
 - e. Interviews and conferences with ministry personnel, teacher educators, teachers and administrators in the schools, school superintendents, school board members, educational leaders, public leaders, students, parents.

- f. Study of data on assessment of achievement and educational improvement.
 - g. Collection of additional information and data from KEDI or from other sources as needed for the study.
 - h. Analysis of findings and development of conclusions and recommendations.
- 8. Provision on a continuing basis for Team/Consultant -- KEDI interchange of ideas and concerns and for a systematic plan of reporting and feedback.
- 9. Continuing study and review in the United States of additional data and documentation by team and consultants during periods between visits to Korea.
- 10. Preparation by team and consultants of ad hoc, interim, and final reports in draft form.
- 11. Review of such reports by KEDI for identification of factual inaccuracies and inappropriate conclusions or recommendations.
- 12. Completion of reports by team and consultants. The final form and content of all reports is the sole responsibility of team, consultants, and team leader.
- 13. Delivery of reports to KEDI and AID.
- 14. Preparation, if considered desirable, of a report specifically intended for dissemination internationally of the "KEDI Story."

VI. THE PROJECT TIME SCHEDULE

It is believed that the most effective time schedule and one which will permit the most efficient utilization of team members and consultants can be achieved by relating the entire effort to major operations of KEDI, especially those involving the Elementary - Middle School Development Project. At the present time a series of small scale tryouts of certain significant program developments are underway. Beginning in September, 1975, a series of three comprehensive demonstrations will begin. The last of these comprehensive demonstrations will be completed at the end of February, 1978. Following the review and assessment of the last of the comprehensive demonstrations KEDI and others will face the necessity of arriving at important decisions concerning future efforts for nationwide dissemination of the new and innovative programs that have been developed and tested in the field as well as the assumption of additional educational responsibilities important to the national development of Korea and its people.

The calendar for these tryouts and demonstrations is listed below:

Small Scale Tryouts

May 28 - June 23, 1973	Four weeks
November 1 - 30, 1973	Four weeks
October 1 - November 30, 1974	Eight weeks
May 1 - June 30, 1975	Eight weeks

Comprehensive Demonstrations

September 1975 - February 1976	Six months
March 1976 - February 1977	Twelve months
March 1977 - February 1978	Twelve months

These tryouts and demonstrations represent critical points in the Elementary-Middle School Development Project. Each yields information

and data which is used by KEDI in its study, review, and modification of the instructional system and instructional materials. Each represents a point in time that offers excellent opportunities for assessment and modification of program, program materials, and strategies. The last of the large scale demonstrations is especially crucial, as stated, since it comes at a time when important decisions must be made concerning dissemination and the installation of the new instructional system on a national scale.

Thus, it is proposed that the analytical case study begin in the summer of 1975 and continue through the summer of 1978. Such a time frame will make it possible for the team and consultants to begin work in the summer of 1975, reviewing all past activities of KEDI including the four small scale tryouts. Team and consultant visits in the following years will also occur in the summer when complete data on each comprehensive demonstration are available for review and study. The final team visit and the final team report will come at the critical time referred to earlier -- after the completion of the last of the comprehensive demonstrations and prior to major decisions relating to future activities of KEDI.

A more detailed description of the small scale tryouts and the comprehensive demonstrations has been included in the Appendix.

VII. TEAM AND CONSULTANT REPORTS

Reports will be classified as ad hoc, interim, and final.

Ad hoc reports will be relatively brief and informal statements prepared either at the request of KEDI or upon the decision of the team/consultants. Such reports will usually deal with specific and immediate matters of concern. Interim reports, however, are to be completed at the conclusion of each team/consultant visit, will be more comprehensive, and will deal with matters which have been the focus of activity and concern during the visit. In addition, certain other types of formal reports of an interim nature may be prepared at the request of KEDI for team/consultant views on particular and specific matters.

The final report shall be prepared during the summer of 1978. As indicated in the design model, this report, as well as others, will be reviewed by KEDI in draft form for appropriate commentary, corrections, and modifications -- all, of course, subject to team acceptance. The final report shall be completed by the team itself.

VIII. THE STUDY TEAM AND THE CONSULTANTS

As indicated in the design of the study and the planning assumptions on which the design was based, it is proposed that an external study team and a number of consultants intended to supplement and complement team efforts have the responsibility for undertaking and completing the analytical case study of KEDI. The team is to be composed of a group of highly competent professionals whose commitment to the case study is assumed to extend throughout the entire period of the project. The consultants, also a group of equally competent professionals, on the other hand will normally undertake short term assignments as their services are deemed important to the project. In some instances consultants may serve only for a single assignment; in other cases, consultants may be requested to undertake several assignments during the period of the project.

It is suggested that the team be composed of seven persons - five from the United States and two from Korea. In the selection of the United States members special attention should be given to the identification of individuals whose competence as a group will include the following:

1. Curriculum and instruction (special emphasis on elementary and middle schools)
2. Management systems (installation and support of instructional processes)
3. Instructional media and technology (emphasis on instructional television and radio)
4. Educational systems evaluation (effectiveness of new instructional and management systems)

5. Teacher education (In-service and pre-service)

Korean members of the team should be recognized authorities/leaders in education in Korea and shall be selected upon the recommendation of KEDI and with the concurrence of USAID/KOREA.

The consultants to the team are intended, as indicated, to both supplement and complement team efforts. In some cases consultants will bring new and additional expertise to the project. In other cases consultants will have competences similar to those already available in the team but needed to complete certain major tasks or to add new dimensions to team thinking. Therefore, it is suggested that arrangements provide for the appointment of a number of consultants for varying and possibly intermittent periods of time. Special areas to be considered include the following:

1. Instructional materials development
2. Elementary-middle school development and management
3. Curriculum planning and development
4. Instructional television and radio
5. Subject field expertise: mathematics, science, social science, language, music, arts, and others
6. Industrial arts - vocational education
7. Educational planning
8. Finance and cost benefit studies
9. Educational administration
10. Innovation diffusion
11. Non-formal education
12. Evaluation
13. Individualized instruction
14. Radio - television engineering

This list of areas of expertise is only tentative. It is quite likely that not all areas will require special consultants in view of the various competences available among team members. The actual areas for which consultants will be required will be determined by the study team and the team leader in cooperation with KEDI and USAID/KOREA as the study progresses. It is planned to utilize personnel from the United States, Korea and possibly other nations in consultant roles.

As stated at several points in this report the selection of both team members and consultants shall be done in cooperation with KEDI and AID/Korea and with concurrence on all individuals selected.

IX. TEAM AND CONSULTANT SCHEDULE IN KOREA

In accordance with the project time schedule a series of team and consultant visits to Korea will be planned for the summers of 1975, 1976, 1977, and 1978. The schedule will be planned in cooperation with KEDI to assure a systematic study program involving team, consultants, and KEDI staff counterparts.

At the present time it is planned that each team member will spend 15 working days (a three week period) in Korea during each of the four summers. In addition, it is estimated that on the average three special consultants from the United States, or other countries, and additional Korean consultants will be needed during each period. Consultants from outside Korea will normally spend 10 working days (a two week period) on each assignment to Korea. The total number of working days for Korean team members and Korean consultants annually is estimated at 40 man days.

In the interests of the highest possible level of efficiency team members and consultants will be provided with the KEDI Report as well as a variety of other documentation and publications prior to coming to Korea so that each individual will be fully briefed and will be able to begin productive work almost immediately after arrival in Korea. In fact, it is planned that all team members will receive pertinent materials and information throughout the entire period of the study so that there can be a constant updating of all project participants.

In order to place the least amount of strain on KEDI resources insofar as counterpart activities are concerned, the visits of the

team and consultants will normally be spread over a six-week period so that at any one time there will usually be a maximum of four or five visiting team and consultants resident at KEDI from outside Korea. A possible exception may be the first summer when initial briefings of the team and consultants will be held on arrival in Korea. In any case such a variation will be determined in consultation with KEDI.

Obviously, such a schedule can at this time be termed only tentative. Needs that develop during the course of the study may cause variations in manpower requirements. For example, fewer consultants may be needed during one summer period and a larger number during a later summer period. Such differences in staff needs will be negotiated with KEDI in order to assure continued and uninterrupted KEDI operation.

Summer has been designated as the best possible time for team and consultant visits since generally it will be possible for the project to enlist top quality staff who might find it impossible to be away from their professional responsibilities during the academic year. Further, it is quite likely that the selection of the summer period for visits to Korea will also make possible the enlistment of top quality Korean team members and consultants for a similar reason.

X. PROPOSED BUDGET

The budgetary requirements for the analytical case study relate directly to the number of team members and consultants, working days, days for which per diem is applicable, and the number of team/consultant visits to Korea.

An estimate has been made of the cost for a single year of the project to include: (1) one team/consultant visit to Korea, (2) nineteen working days including travel by each of four United States team members, (3) twenty-five working days including travel by team leader, (4) appropriate per diem payments, (5) travel costs, (6) daily stipends at the rate of \$130 per working day, (7) a per diem rate of \$38 per day in Seoul, (8) a total of 40 man-days of work by Korean team members and consultants at a variable daily stipend, (9) translators, (10) other costs to include supplies, equipment, communications, travel, secretarial services, etc. According to this estimate, which is shown on the following pages, the cost for a single summer, exclusive of overhead is \$44,720.

In recognition of the need for continued project activity during the intervals between the summer team/consultant activities, an estimate has been made of costs involved in assuring continuity of effort. Costs will cover continued team and consultant activity related to review, study, and analysis of updated information by team leader and team/consultants, possible consultation and/or meetings, possible travel by team leader to Washington and Korea, and translation of Korean reports and other documents. The cost for each of the three intervals between summer project activity is estimated at \$9,460 exclusive of overhead.

If the proposed plan is acceptable, the total cost of the entire analytical case study will be \$ 223,260 including a very modest overhead charge. Although the overhead charge is extremely small and below normal overhead charges, it is anticipated that negotiations can result in the approval of the minimum amount listed in the budget. The overhead cost assures constant oversight of the project by University personnel throughout the entire contract period. Services provided by the contractor under such an arrangement are normally considerable and include continuous management and planning, evaluation of progress, modification of procedures as deemed important to attainment of project goals, the provision of specialized expertise as needed from institutional resources, careful disbursement of funds, and meticulous record keeping.

The following assumptions form the basis for the determination of the project budget.

1. Team/consultant effort in Korea

- . Group visits of team and consultants to Korea will occur in the summers of 1975, 1976, 1977, 1978.
- . Team will consist of team leader and four United States members plus at least two Korean members.
- . Consultants from the United States and other countries will normally be three in number each year with additional consultants from Korea.
- . Team leader will have 25 working days in Korea including four days travel time and 31 days per diem including weekends.
- . Team members will have 19 working days in Korea including four days travel time and 25 days per diem including weekends.
- . Consultants will have 14 working days in Korea including four days travel time and 18 days per diem including weekends.

- Korean team members and consultants will accumulate a total of 30 man-days.

- Note: The above figures for working days and days per diem refer to each of the four summer periods.

2. Team/consultant effort in the United States

- Team leader will be responsible for continued efforts relating to project during intervals between concentrated summer activities of team and consultants.
- Team and consultants will be expected to study, review, and analyze updated information relating to KEDI during intervals between summer activities.
- Consultation involving team leader/team members/consultants may be required during intervals between summer activities.
- Certain circumstances may require team leader visits to Korea and Washington during intervals between summer activities.
- Need for translation of Korean reports and documents may occur.

3. Estimated cost items for each summer

- International travel from United States to Korea and return, estimated at \$1,700 per individual
 - Eight team members/consultants \$ 13,600
- Daily stipends for team members/consultants at \$130 per day
 - 143 working days 18,590
- Per diem payments for team members/consultants at \$38 per day
 - 185 days per diem 7,030
- ✓ • Korean team/consultants at variable rates
 - 40 man-days - 2,500
- ✓ • Korean translators at variable rates - 1,500

- . Other costs (supplies, equipment, communications, travel, secretarial services, etc.)

- 1,500

Total per summer

\$ 44,720

4. Estimated cost items for each of the three intervals between summer activities

- . Team leader stipends

2,000

- . Team/consultant stipends

3,000

- . United States travel

1,000

- . International travel

1,700

- . Per diem payments

760

- ✓ Korean translators

-1,000

Total per interval

\$ 9,460

7500

Based on the preceding information and cost items, the total budget for the analytical case study of KEDI is estimated as follows:

Summer Project (1975)	\$ 44,720
Interval (1975-1976)	9,460
Summer Project (1976)	44,720
Interval (1976-1977)	9,460
Summer Project (1977)	44,720
Interval (1977-1978)	9,460
Summer Project (1978)	<u>44,720</u>
Total	\$207,260
Overhead	<u>16,000</u>
Grand Total	\$223,260

45,000

3

128

140

75,000

60

141,000

XI. THE CONTRACT

It is suggested that the contractual arrangements for the analytical case study be made with the University of Pittsburgh rather than with a number of individuals on a series of personal services contracts. There are a number of reasons which support such a proposal.

1. A contract which is expected to span a period of several years would appear to have greater stability in the case of an institutional contractor, especially an established university, rather than with a number of different individuals expected to serve as team members or consultants.
2. Changes in team membership or in consultant arrangements which might become necessary over a period of time would have less adverse effect on the continuity and effective performance of contractual agreements when the major responsibility rests on a university rather than on a number of individual contractors.
3. A university with its large and diverse faculty with competences relevant to the task to be undertaken offers greater potential in terms of the resources needed. Further, in a university setting, it is quite likely that many additional resources will be provided outside the contractual requirements

In terms of support in project planning, review modification, and evaluation.

4. The present and anticipated contractual arrangements with the writer will, if desired by KEDI and AID, be assured through specific contract requirements. Similarly, the contract will call as well for KEDI and AID concurrence in the selection of team members and consultants.
5. With the University of Pittsburgh as the United States base of contract operations and with a large part of the team and possibly consultants from Pittsburgh or the general eastern region of the United States, there would be a real increase in both efficiency and economy of the operation resulting from the general proximity of team members and consultants, from the ease of day-to-day communication, and from the relatively low cost of travel to team/consultant meetings in the United States as deemed important to the project.
6. The University of Pittsburgh with which the writer has long been affiliated as an administrator and faculty member, would appear to be the most logical choice as the contractor. The University has a national and international reputation for excellence. In fact, it is a member of the American Association of Universities, a prestigious organization of only 50 institutions to which membership is by invitation only.

7. Also of importance is the extensive experience of the University in international education activities and in international consulting services throughout the world. In fact, since 1968 there has been a continuing relationship of the University with Korea through faculty exchange, through graduate student educational programs, and through cooperative research activities.
8. Such a contractual arrangement with the University of Pittsburgh has the full concurrence and support of KEDI.

APPENDICES

APPENDIX A

AN OUTLINE OF THE ANALYTICAL CASE STUDY OF KEDI

This tentative outline is focused primarily on the content areas of the final report of the study team and the team consultants. However, it is important to point out that the report will be more than a mere descriptive statement. As a case study, the report will give special attention to the environment in which KEDI was established, to purposes and goals, to processes used to achieve those purposes and goals, to the establishment and development of external relationships, to problems encountered, to strategies used to surmount problems, to long range planning, and to outcomes. The use of this analytical approach will, it is believed, result not only in a record of "the history, mission, research, and institutional growth of KEDI and the E/M Project overall system," but also in a document that can serve as a guide to KEDI in its continuing effort to improve education in Korea and to other developed and developing nations involved in major educational reform.

I. Introduction

- A. The setting
- B. Purpose of the study
- C. Nature of the task
- D. Methodology used

II. Background--Korea

A. Developmental patterns in Korea

- 1. Economic
- 2. Social
- 3. Political
- 4. Implications for education

B. Education in Korea

- 1. Historical review
- 2. Basic principles
- 3. The educational system
- 4. Development at various levels
 - a. Primary
 - b. Middle
 - c. Secondary
 - d. Higher
 - e. Teacher education
 - f. Non-formal education
- 5. Research and development
- 6. Long range educational planning
- 7. Major problems in education

III. Korean Educational Development Institute (KEDI)

A. Origin

- B. Nature and Purposes
- C. Structure, governance, financial support
- D. Responsibilities
- E. Staff development
- F. Operations
- G. Developmental problems

IV. The Major Roles of KEDI

- A. Elementary--Middle School Development Project
- B. Research and long range educational planning
- C. Special program development

V. The Elementary-Middle School Development Project

- A. Origin of the project
 - 1. Purposes
 - 2. Involvement and role of KEDI
 - 3. Outcomes to be achieved
- B. The project plan--elements, processes, outcomes
 - 1. Educational goal development
 - 2. Curriculum planning
 - 3. Instructional-learning systems
 - 4. Management system
 - 5. Instructional-learning materials development
 - 6. Instructional television and radio
 - 7. Pre-service and in-service teacher education
 - 8. System evaluation
 - 9. Diffusion for nationwide implementation
- C. Administration and Finance
 - 1. Organization and staffing

2. KEDI five year plan (1973--1978)
3. Sources of financial support
4. Finances-current status and problems
- D. External relationships
 1. Schools-teachers and administrators
 2. Universities and colleges
 3. Teacher organizations
 4. Government
 5. The public
- E. Analytical review of progress
 1. Framework of E-M Project
 2. E-M Project as a development process
 3. Outcomes in field tryouts and demonstrations
 4. The new system
 - a. Goals
 - b. Input requirements
 - c. Process
 - d. Expected outcomes
 - e. Analysis
 - f. Cost-effectiveness
 5. Installation of innovations
 6. Continuing problems and concerns
- VI. Research and Long Range Planning
 - A. General role of KEDI in research and planning
 - B. Specific projects
 1. Research on national long-range educational plan
 2. Preparation of national five year educational plan

C. Research related to E-M project

1. Variables related to innovation and diffusion
2. Problems of teacher education
3. Educational goal development
4. Educational media research
5. Educational policy research

D. Processes and outcomes--an analytical review

E. Problems and concerns

VII. Special Program Development

A. The role of KEDI in special program development

B. Program areas

1. High School of Air and Correspondence
2. Non-formal education for community development
3. In-service teacher education
4. Career education
5. Pre-school broadcast programs
6. Population education (with UN)
7. Instructional television and radio production
8. Industrial arts-vocational education
9. National assessment of student achievement

C. Processes and outcomes--an analytical review

D. Contributions of projects to educational reform

E. Problems and concerns

VIII. Summary of report

IX. KEDI--The Future

- A. New and challenging tasks
- B. Strategies and alternatives
- C. Continuing role of leadership

X. Implications of KEDI Experience for Educational Innovation
in Other Nations

APPENDIX B

TRYOUT AND DEMONSTRATION OF NEW INSTRUCTIONAL SYSTEM

First Tryout

- . May 28--June 23, 1973 (four weeks)
- . Two schools and 12 classes
- . Mathematics and science at grade levels 3 and 5
- . Feasibility test of new instructional system and its applicability to lower grades in elementary school

Second Tryout

- . November 1--30, 1973 (four weeks)
- . Three schools and 21 classes
- . Mathematics, Korean language, and moral education at grade level 2
- . Applicability of new instructional system to variety of subject fields in elementary school

Third Tryout

- . October 1--November 30, 1974 (eight weeks)
- . Two schools and 10 classes
- . Eight subject matter fields at grade level 3
- . Efficiency of new instructional system in each subject matter field
- . Optimum amount of instructional materials including ITV programming

Fourth Tryout

- . May 1--June 30, 1975 (eight weeks)
- . Two schools
- . Eight subject matter fields at grade 5
- . Additional testing of new instructional system

First Comprehensive Demonstration

- . September 1975--February 1976 (6 months)
- . All subject matter fields (eight) at grade levels 3 and 5
- . Thirteen elementary schools (located in the area covered by TCOM Transmitting station)

Second Comprehensive Demonstration

- . March 1976--February 1977 (12 months)
- . All subject matter fields at grade levels 2 and 6
- . Thirty elementary schools (located in the area covered by TCOM) plus a small number of others

Third Comprehensive Demonstration

- . March 1977--February 1978 (12 months)
- . All subject matter fields of elementary school grades 1--6 and six subject matter fields of middle school grades 7--9
- . Thirty elementary schools and 15 middle schools

Note: In addition to the "experimental schools" listed above as participating in the comprehensive demonstrations, a number of additional schools will also participate on a voluntary basis as "cooperating schools."

Components of new instructional system to be demonstrated

- . Learning-instructional materials
 - . Teacher guides
 - . Student work books
 - . Instructional television and radio programs
 - . Diagnostic, formative, and summative tests

- . New instructional system
 - . General model
 - . Specific models designed for subject matter fields and grade levels
- . New management system to introduce and demonstrate experimentally the following changes
 - . Different class organization
 - . Management of instructional units on basis of grade level rather than class
 - . New scheduling involving ITV and IR

Inputs specifically required

- . Television receivers for class use
- . Teacher guides
- . Student work books
- . Various tests

APPENDIX C

BACKGROUND INFORMATION FOR TEAM AND CONSULTANTS

Education in Korea, 1973. Prepared by KEDI for the Ministry of Education of the Republic of Korea and published in Seoul, Korea, 1974.

System Analysis for Educational Change. Edited by Robert M. Morgan and Clifton B. Chadwick and published by Florida State University in Tallahassee, Florida, 1971.

Project Evaluation Guidelines (Third Edition). Prepared by the staff of the U.S. Agency for International Development and published in Washington, D.C., 1974.

Use of Development Indicators. Prepared by the staff of the U.S. Agency for International Development and published in Washington, D.C., 1974.

The following publications have been prepared and published by the Korean Educational Development Institute.

An Evaluation Plan for the KEDI Educational System (mimeo), date not specified.

A New Instructional System: Summary Report of the First Small-Scale Try-out, 1973.

An Application of a New Instructional Model: Summary Report of the Second Small-Scale Try-out, 1974.

Brochure of KEDI, 1973

Brochure of KEDI, 1974

Annual Report of KEDI, 1972-1974, 1974

Teacher's Guide for Population Education in Social Studies of Grades 1-3 in Elementary School, 1974.

Curriculum Development for Population Education: Social Studies in Elementary and Middle Schools, 1974

International Meeting on Korean Educational Development Project (1974. 11. 8-9), 1974

Brochure of KEDI Educational Broadcasting System, 1974

Current Status and Problems in Teacher Education for Korean Elementary Schools (English Abstracts), 1973

An Experimental Research on the Effects of Inquiry Teaching (English Abstract), 1974

An Explanatory Study of the Key Variable for the Diffusion of Educational Innovation (English Abstract), 1973

A Study on the New Community Education Activities (English Abstract), 1974

APPENDIX D

TEAM/CONSULTANT RECOMMENDATIONS

A Panel of Individuals Eligible for Service as Team Members and/or Consultants

- . The individuals listed here comprise an eligibility list from which will be selected both team members and consultants. All on the list have been approved by KEDI and have been submitted to USAID/KOREA for review. Additional names may be added with the concurrence of both KEDI and USAID/KOREA.
- . Individuals have been classified in those categories identified as essential in the report. For most individuals relevant additional known areas of specialization and competence have also been listed. Specific categories recommended in the report are:

- I. Curriculum and Instruction
- II. Management Systems
- III. Educational Media and Technology
- IV. Educational Systems Evaluation
- V. Teacher Education

In addition, there are two added categories:

- VI. General (in recognition of the need for individuals with a wide range of experience and capabilities and judged to be highly competent to appraise the total program and its operations)
- VII. Team Members/Consultants from Korea

- . Biographical summaries are available for all persons listed.
- . In general those individuals listed for possible roles as team members are also eligible for appointment as consultants.
- . Before actual appointment of any individual to a position as either a team member or a consultant, a final clearance will be requested from both KEDI and USAID/KOREA.

I. CURRICULUM AND INSTRUCTION

TEAM MEMBER	ADDED SPECIALIZATIONS
✓ Dr. John Bolvin, Associate Dean School of Education University of Pittsburgh	. Individualized instruction . Management systems . Systems evaluation
Dr. Horton Southworth, Director Division of Teacher Preparation School of Education	. Teacher education . Education for disadvantaged . Management systems
Dr. Martin Habermann, Professor Department of Curriculum and Instruction School of Education University of Wisconsin--Milwaukee	. Teacher education . Education for disadvantaged
CONSULTANT	
Dr. Betty Schantz, Assistant Dean College of Education Temple University	. Teacher education . Management systems . In-service teacher education
Dr. Paul Bixby, Professor College of Education Pennsylvania State University	. Teacher education . In-service teacher education
Dr. William Engbretson, President Governors State University	. Teacher education . Education for disadvantaged
Dr. Leo Klopfer, Professor School of Education University of Pittsburgh	. Science education . Individualized instruction
Dr. Katherine Atman, Director Teacher Corps Project School of Education University of Pittsburgh	. Social science education . Affective education
Dr. Shirley Hill, Professor School of Education University of Missouri--Kansas City	. Mathematics education
Dr. Rolland Paulston, Professor School of Education University of Pittsburgh	. Non-formal education . Educational policy studies . Evaluation
Dr. Karl Openshaw, Dean School of Education University of Colorado	. Teacher education . Management systems

CONSULTANT

ADDED SPECIALIZATIONS

Dr. Charles Gorman, Associate Professor
School of Education
University of Pittsburgh

- . Administration
- . Teacher education

Mr. Paul Merrick
Creative Components

- . Science education

Mr. James Vargo, Vice Principal
Kensington Jr. High School
Kensington, Maryland

- . Administration
- . Middle schools

Dr. Robert Gagne, Professor
College of Education
Florida State University

- . Instructional systems
- . Learning theory

II. MANAGEMENT SYSTEMS

TEAM

ADDED SPECIALIZATIONS

Dr. John Bolvin
(See I)

✓ Dr. Paul Watson, Co-Director
University Center for International
Studies
University of Pittsburgh

- . Innovation diffusion
- . Evaluation

Dr. William Cooley, Co-Director
Learning Research and Development Center
University of Pittsburgh

- . Educational systems evaluation
- . Individualized instruction

CONSULTANT

Dr. Clifton Chadwick
Specialist in Education Technology
Organization of American States
Argentina

- . Educational systems evaluation
- . Educational technology

Dr. Harry Bowes, President
Southern Colorado State College

- . Teacher education
- . Career education

III. EDUCATIONAL MEDIA AND TECHNOLOGY

TEAM

ADDED SPECIALIZATIONS

✓ Dr. Seth Spaulding, Professor
International and Development Education
Educational Communications and Technology
School of Education
University of Pittsburgh

- . Management systems
- . Educational systems evaluation
- . Non-formal education

Dr. William F. Grady, Professor
School of Education
Temple University

. Educational systems evaluation

Dr. David Crossman, Professor
School of Education
University of Pittsburgh

. Management systems
. Instructional design

CONSULTANT

Dr. Anthony Arabia, Assistant Professor
School of Nursing
University of Pittsburgh

. Instructional design

Dr. Louis Berry, Visiting Assoc. Prof.
School of Education
University of Pittsburgh

. Instructional design

Mr. Floyd Mallott, Engineer
Teleprompter Corporation

. Television engineering

Dr. Wilbur Schramm
East-West Center

. Educational television
. Educational radio

IV. EDUCATIONAL SYSTEMS EVALUATION

✓ TEAM

Dr. C. M. Lindvall, Professor
School of Education
University of Pittsburgh

ADDED SPECIALIZATIONS

. Individualized instruction
. Mathematics education
. Management systems
. Mastery learning

Dr. Richard Cox, Professor
School of Education
University of Pittsburgh

. Educational and psychological testing

CONSULTANT

Dr. Jack W. Birch, Professor
School of Education
University of Pittsburgh

. Educational and psychological testing
. Special education
. Middle schools

Dr. Hector Correa, Assoc. Professor
Schools of Education, Public Health,
and Public and International Affairs
University of Pittsburgh

. Educational planning
. Cost benefit studies
. Population

Dr. David Krathwohl, Dean
School of Education
Syracuse University

. Affective education
. Educational and psychological testing
. Instructional design

Dr. James Kelly
(See V)

Dr. David Krathwohl
(See IV)

Dr. Jack Birch
(See IV)

Dr. John Singleton, Professor
School of Education and Department of Anthropology
University of Pittsburgh

Dr. Fred Bryan,
Professor Emeritus
School of Education
University of Pittsburgh

Dr. Ruth Wong, Director
Institute of Education
University of Singapore (affiliation)

Dr. Amnuay Tapingkae, Director
Regional Institute for Higher
Education Development
Singapore

Dr. B. O. Ukeje, Provost
Alvan I Koku College of Education
Owerre, Nigeria

Dr. Robert Keller, Professor
School of Education
University of Minnesota

Dr. Frank Klassen, Associate Director
American Association of Colleges for T.Ed

VII. TEAM MEMBERS/CONSULTANTS FROM KOREA

Dr. Chung Bom Mo, Dean
College of Education
Seoul National University

Dr. Kim Chong Chul, Professor
School of Education
Seoul National University

Dr. Kim Ran Soo, Dean
Graduate School of Education
Yonsei University

Mr. Kim Dong Chul
Professor and Director of Planning Office
Ewha Women's University

Mr. Oh Byung Moon, Dean
Teachers College
Chung Nam University

Mr. Lee Churl Hee, Dean
Seoul Junior Teachers College

Dr. Yoo In Jong
Professor of Education
Korea University

Dr. Richard Speagle, Professor
Drexel University

. Cost effective studies

V. TEACHER EDUCATION

TEAM

✓ *sumner*
Dr. Paul H. Masoner, Dean Emeritus
School of Education
University of Pittsburgh

ADDED SPECIALIZATIONS

. Evaluation
. International education
. In-service teacher education

CONSULTANT

Dr. William Engbretson
(See I)

Dr. Betty Schantz
(See I)

Dr. Karl Openshaw
(See I)

Ms. Lilliana Muhlmann, Professor (on leave). In-service teacher education
Higher Institute of Teaching
Santa Fe, Argentina
. Educational planning
. Instructional systems

Dr. Ellis White, Dean
School of Education
University of North Florida
. Educational planning
. Management systems

Dr. Sam Wiggins, Dean
School of Education
Cleveland State University
. Curriculum and instruction
. Educational planning

Dr. James Kelly Jr., Dean
School of Education
University of Pittsburgh
. Educational planning
. Education of disadvantaged
. Management systems

VI. GENERAL

CONSULTANTS

Dr. Paul Watson
(See II)

Dr. Ellis White
(See V)

Dr. Sam Wiggins
(See V)

Dr. Donald Adams, Chairman
Division of Educational Studies
School of Education
University of Pittsburgh

Dr. S. L. Kong, Director
School of Education
Chinese University of Hong Kong

Note: Additional names will be added to panel and will include not only administration and faculty from universities and colleges but will also include school superintendents; principals of elementary, middle, and secondary schools, both public and private; ministry officials; other educational and civic leaders; and news media representative..